EDUID User Manual

IDAHO STATE DEPARTMENT OF EDUCATION

TECHNOLOGY SERVICES | ISEE

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INTRODUCTION

The Education Unique Identifier (EDUID) application is used to assign and verify unique IDs (nine digit numbers) for individuals associated with educational programs in the State of Idaho. All students attending and staff, including substitutes (certified as well as non-certified), in Idaho publicly funded K-12 educational institutions are required to have an EDUID number.

Information can be submitted in a batch via a CSV file or individually on the EDUID website. The EDUID application compares submitted name information with current data contained in the Idaho State Department of Education (SDE) database. The matching process will produce one of four results:

1. If the submitted new person's **name** is very similar to a person already in the database, a match is made and the EDUID is returned to the submitter (either displayed on the screen or in a CSV file). However, if the date of birth (DOB) is not exact, no match is found – even if the submitted name is exactly the same as in the database.
2. If no strong match is found, but one or more existing people are fairly close matches, the submitter is asked to determine if one of them appears to be a correct match. If none are a correct match, a new record and identifier should be created.
3. If the new person's submitted information is very similar to multiple people already in the database, then the submitter is asked to determine which of the matches would be the best match or whether a new record and identifier should be created.
4. If the new person's submitted information is NOT sufficiently similar to a person already in the database, a new record and EDUID can be created and the EDUID is sent back to the submitter (automatically, without input from the submitter).

Important: If the birthdate is not exact, there will be no matches returned. If the person is coming from another Idaho district and you have no matches listed, verify the correct birthdate. Submit an OTIS ticket to SDE Support if the DOB is incorrect in the SDE database. Instructions for submitting an OTIS ticket can be found on the ISEE homepage under the Training tab.

The EDUID system relies on this data to determine if the submitted name is a match to an existing person. The primary comparison data is:

* Legal Name
* Given (a combination of first, middle and **any** suffix) and
* Family (last name)
* Gender
* Date of Birth
* State Code of Last School Attended (optional)

Idaho statue § 18-4511 (2) mandates that names be obtained from legal documents.

- Use complete legal names – full middle names and maternal and paternal family names where applicable.
- Names can be obtained by a certified copy of the person's birth certificate, a passport, a visa, or other government documentation.
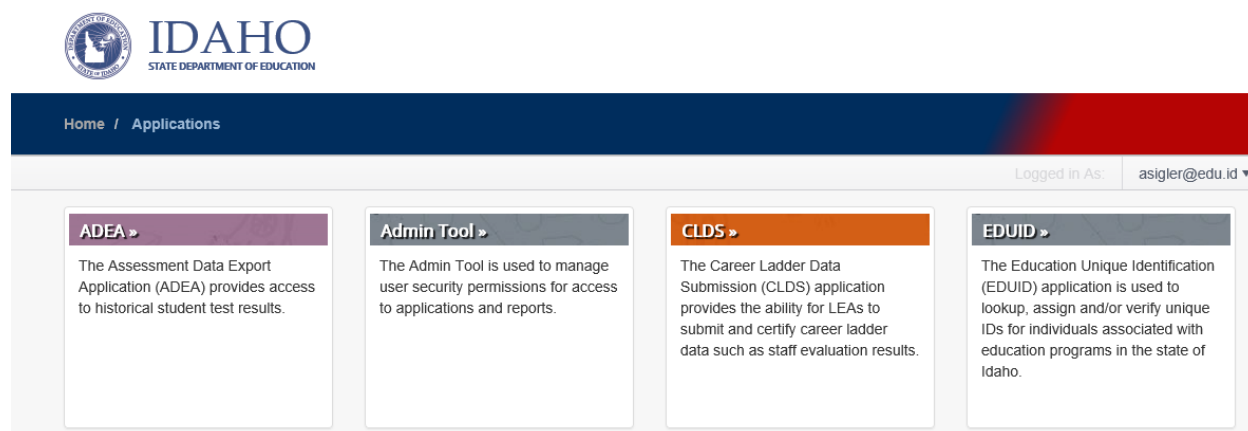- A document can be found on the ISEE homepage under Program Information titled <u>Naming Guidelines</u> to assist districts in reporting names correctly.

ACCESSING THE EDUID APPLICATION

Before accessing any SDE application, users must first obtain a login and password. Please refer to the <u>New SDE Applications User</u> document.

Navigate to the SDE homepage <u>www.sde.idaho.gov/</u>

- Click on the ISEE tile
- Click on the SDE Applications Portal tile
- After correctly logging onto the portal, the user will be directed to the Applications page (as noted in the graphic below).

SDE Applications Portal Page

This is a single landing page where the user accesses the application(s) he/she is authorized to use. The list of authorized applications varies between individuals based on their roles and responsibilities, as well as their school district, charter school, or school structure.

- Click "EDUID" to be directed to the EDUID application page.

SINGLE PERSON EDUID SEARCH/REQUEST EDUID

The EDUID application provides a page to request a single EDUID as opposed to creating several through the batch method.

The **Request EDUID** page uses Given Names (first and middle) and Family Names (last). The Name Guidance document, found on the ISEE homepage under Program Information, provides more detail on gathering names from legal documents.

- Use full legal Given Names including middle name (if it exists)
- Do not use nicknames
- If the student's legal last name is explicitly defined and contains more than one name separated by a space, enter those names, but do not hyphenate unless hyphens are present on the legal document.

Important - Suffixes such as Jr. are entered as part of the Given Name(s) rather than the Family Name(s).

Request EDUID page

DATA MATCH RESULTS

- Click the Request EDUID button.

The application will display the name and EDUID of a person it believes matches the input information. You can use the displayed EDUID.

EDUID Search Results page

A match was found even though the Given Name(s) field did not match exactly. If you are certain the search results did NOT produce an accurate match, the Generate New EDUID button can be used to create a new record and a new EDUID. Shading in a cell highlights data that is different from submitted data.

EDUID Search Results page

Notice the result when the Birthdate is off by one (DOB is 1/1/1972). No result was returned – even though the name was entered exactly. If you know the person was a student or employee in another district and should have an EDUID, you should verify the Birthdate and either:

- Click Modify Search and correct the data
- Submit an OTIS ticket to correct the SDE database

In some cases, the user's information will not yet be in the database. This will happen with kindergarten students, students moving in from out of state that have never attended school in Idaho, new teachers, new volunteers, etc. In this case, the user should verify that the data entered is correct. If it is correct, click the **Generate New EDUID** button to generate an EDUID for that person.

EDUID BATCH PROCESSING USING THE UPLOAD MODULE

The Upload allows a batch upload of student and staff information and a download of EDUIDs. The Upload will assist you in browsing to the file of names you saved to your computer, uploading the file to the EDUID application, and the downloading of a response file on completion of the EDUID batch assignment process. As long as you create your file from the file

template, the file handling process will validate the format, match names with names already in the system, and create EDUIDs for those that are not in the system.

- Download a copy of the EDUID template
  - o Login to the EDUID application
  - o Click the EDUID link under Templates

SDE Providers page

Create a CSV file containing individual student or staff information from your district data systems (i.e. Student Information System, HR System etc.). Save the file to a location you can easily find. Edit the file columns and headers (or copy and paste the data) to match the template headers. Below is a copy of the EDUID template.

EDUID Template Headers

	A	B	C	D	E	F	G	H	I	J	K	L
1	LocalPersonId	Eduld	FirstName	MiddleName	LastName	BirthDate	Gender	LastSchoolCode	AltLastName1	AltLastName2	AltLastName3	AltLastName4
2												

Once the CSV file has been populated and saved:

- Click the Upload link
- Begin typing your district name then select your district from the dropdown list
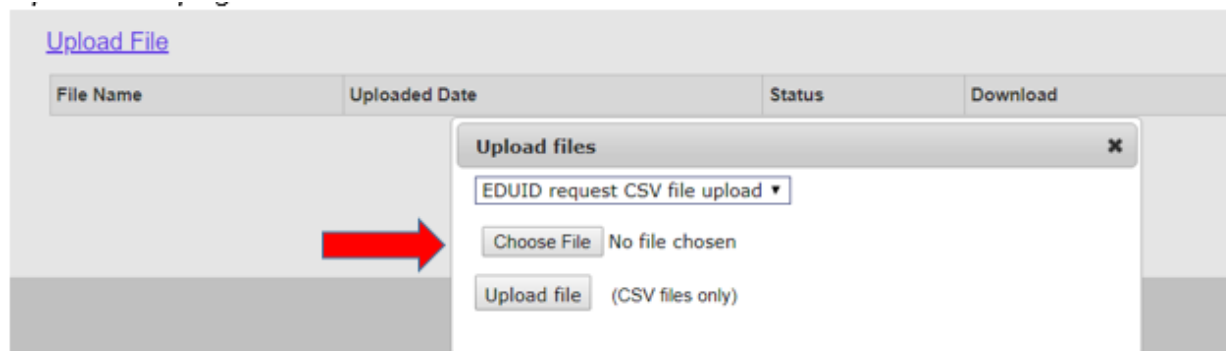- Click the Eduid K12 – Waiting For Upload link

Upload page
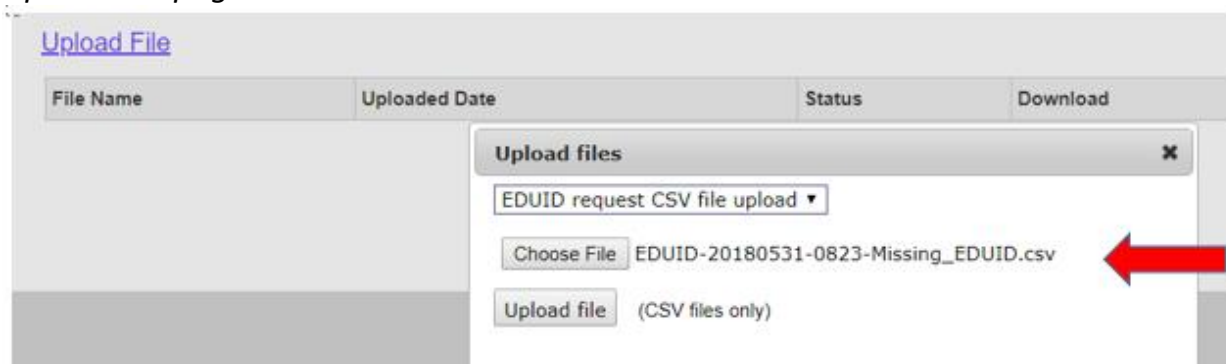

- On the Upload files window, click Choose File

Upload File page

- Click on the browse button and use the navigation page to find the file you created in Step 1. Highlight the file and click open.
- Verify the path and name of the file is correct.

Upload File page

- Click the Upload file button.

The file management page will display information about the file you uploaded (you may need to refresh the browser). The Status information provides you a link to Resolve Issues if there are any and a link that will provide you with Results. If the Status shows Resolve Issues, it could be due to:

- no match rows
- multiple match rows
- match rows that need to be manually reconciled by the user.

After your upload has been processed, you will receive an email informing you that the upload has been completed and advising you of any issues with the files that must be manually resolved before processing can be completed.

If you have issues to be resolved:
1. Click on the Resolve Issues link

Results page

The first section of the page contains the File Detail. This section provides the File Name, the File Status, the number of Rows in the file, the number of Unmatched rows, the number of Multiple Matches rows, and the Received Date.

The next section provides the detail information for the unmatched rows. There may be two groups of unmatched persons. The first group will display persons where a possible match was found. For each person in this group, the original data you uploaded will be displayed above the possible matches that were found and a choice to create a new EDUID if you think none of the choices are reasonable matches.

Resolve Issues page

Resolve Issues

File Detail

File Name	File Status	# Rows	# Unmatched	# Multiple Matches	Recieved Date
EduIdUploadTemplate practice.csv	Valid	1	1	0	5/31/2018 1:41:38 PM

Unmatched Persons

Possible Matches

The following person(s) were closely similar to existing persons, but were different enough that an automatic match could not b
you're looking for.

		Lea StudentID	Given Name	Family Names	Gender	BirthDate
Unmatched		123456	**John**	**Superintend**	**Female**	**1/1/1972**
Possible	○		John Lee	Superintendent	Male	1/1/1972
	○		Create a new EduId			
	◉		Skip (Does not create an EduId)			

Multiple Matches Summary

No Multiple Matches.

[Accept]   [Cancel]

The second group will display persons where no match at all was found. For each person in this group, the original data you uploaded will be displayed, with options for creating a new EDUID for that person, or skipping that person. Initially the skip option is selected for each person. There are two buttons above the row descriptions that will let you Select Create for All or Select Skip for All. If there is a large number of students that have no match, rather than display them all individually, the information for a sample of ten is displayed. It is important that you look at the data before choosing to create new EDUIDs to be sure there are no fundamental problems in the file such as transposed first (given) and last (family) names which may have caused them not to match. In some cases, a warning will be displayed in the Warnings column to assist you in correcting the student file.

If, after review of the original file, you find that some of the rows should have EDUIDs created then click on the individual radio button that says Create a new EDUID.

Resolve Issues page

Resolve Issues

File Detail

File Name	File Status	# Rows	# Unmatched	# Multiple Matches	Recieved Date
SDE-Missing_EDUID.csv	Valid	2	1	1	7/19/2018 4:06:35 PM

Unmatched Persons

No Matches

No matches were found for the following people. You can use the button below to select the "Create a new EduId" choice for all of the persons having no matches. First make sure there is not a fundamental problem in the data such as transposed first (given) and last (family) names that caused them to not match anyone.

[Select Create for all]   [Select Skip for all]

	Lea StudentID	Given Name	Family Names	Gender	BirthDate	Warnings
Unmatched	12345	**Sally**	**Doe**	**Female**	**1/1/2011**	
	○	Create a new EduId				
	●	Skip (no EduId is created or returned)				

Multiple Matches Summary

	Lea StudentID	Given Name	Family Names	Gender	BirthDate
Multiple Match	12346	**Jane**	**Doe**	**Female**	**1/1/2011**
	●	Jane M	Doe	Female	1/1/2011
	○	Jane T	Doe	Female	1/1/2011
	○	Skip (no EduId is created or returned)			

[Accept]   [Cancel]

The Multiple Matches section displays persons that strongly matched more than one other person. The original data you uploaded for the person is displayed above the data of the person(s) that matched. Select the person that appears to be the best match. The system pre-selects the choice it thinks is probably the best match, but you should change the selection if it has not made the right choice.

After you have reviewed the sections described above and made any selections, click on the Accept button at the bottom of the page to have the system act on your selections. Click the Skip button to direct the system to take no action. You can then make corrections and re-upload the file if needed.

Once you complete your review and have created or skipped the unmatched names, then you will be taken back to the file management page. Notice that the Status has changed to Complete.

File Management page

Now you can click on the Results link, which will download your new EDUIDs and any rows that did not get EDUIDs created. Now you can save this file to a location of your choosing.

FILE VALIDATION ERRORS

After uploading the file you may see some different information on the file management page. The Status information may show that the file was uploaded but instead of a Results link, you have a Submit (ignore errors) button. In the lower portion of the file management screen you can see that the Status is listed as Invalid with a link to View Row Problems and a message letting you know how many rows have errors. **Do not click the Submit (ignore errors) button until you have resolved the issues.** Files can be invalid for a number of reasons. The validation routine will ensure that names, dates, and gender are valid. The file manager is designed to allow importing of an invalid file and validation routines check the file and attempt to help the user determine why it failed.

File Validation page

Click on the View Row Problems link and this will bring up a page something like the screen below. You will notice that the Errors column provides information as to what needs to be corrected to validate the upload. In this case, the BirthDate is a date in the future, which is not valid.

View Problem Rows page

THE VERIFY EDUID LINK

At times, you may need to verify that the information you have about an individual is correct. The verify link is designed to assist you with this. Enter the EDUID and complete the other fields just as you would to request an EDUID (note: gender is not required). Full names are preferred, including middle name and both family names if they exist.

Verify EDUID page

If the information entered matches a record in the database, the name and EDUID results will be displayed.

Verify EDUID page

If the data entered DOES NOT match a record in the database, the results will be displayed as shown below.

Notice the Birth Date is incorrect

Verify EDUID page

CORRECTING ERRORS – MERGES

EDUID errors can be corrected by submitting an OTIS ticket. Directions for submitting an OTIS ticket can be found on the ISEE homepage under the Training tab. Please include the name, date of birth, and gender for the people in question and the action you are requesting (merge, DOB correction, name change, etc.).

ASSISTANCE

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